



TREASURER-TAX COLLECTOR COUNTY OF SAN DIEGO

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DAN McALLISTER
Treasurer-Tax Collector



MEDIA RELEASE

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Over \$1.2 million in property tax refunds up for grabs **Treasurer searching for eligible taxpayers; outlines process**

San Diego, CA... San Diego County Treasurer Tax-Collector Dan McAllister announced today a program to refund nearly \$1.2 million to County property taxpayers. He indicated that for a variety of reasons each year, a number of taxpayers overpay their taxes. An alphabetical listing of taxpayers entitled to a refund under this program can be found on the Treasurer-Tax Collector's website (www.sdtreastax.com). Amounts and the years for which the refunds are due are also shown with each name listed.

"We have a duty to make every possible effort to reunite taxpayers with their money. This is not the government's money - it belongs to the people. However unless taxpayers step forward to claim their refunds we will have no choice under State law except to escheat the unclaimed funds over to the County's General Fund," McAllister said.

State law does not permit the funds to be turned over to the County's General Fund until at least four years have passed since the taxes that were due, were overpaid. In this case, \$1,233,295 million in refunds have accrued over the past three and a half years dating back to the 2003-2004 tax cycle.

According to McAllister, each year the Treasurer-Tax Collector's office works diligently to refund monies that are overpaid by taxpayers. The job is not quite as easy as it might sound. The reasons why vary. People move, divorce, die, separate, remarry, change their names, or because their taxes are paid through impound accounts by out-of-state banks (in many cases loans are packaged locally by local institutions and then sold to out-of-state banks or loan servicing companies), it is more difficult to find the taxpayer.

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“Clearly, locating the rightful owner of the funds takes extra effort. The most important thing to us is that the taxpayers are owed this money and it is our duty to make every attempt possible to reunite them with their funds,” added McAllister.

Of the total refunds available, the largest amount of an unclaimed refund for an individual is \$5,681.54 (owed to Gregory Matis for tax year 2005-2006) and the smallest amount is: \$10.24 (owed to Terry Bluel for tax year 2003 - 2004). The largest refund owed to a business is: \$32,363.36 (owed to Courtyard Villas 6 LLC for tax year 2003-2004) and the smallest unclaimed refund for a business is \$10.02 (owed to JJ Saron, Inc. for tax year 2005-2006). Following is a breakdown showing the number of refunds available by tax year and the total amounts for each year:

- 2002-2003 (250 refunds for a total of \$128,304)
- 2003-2004 (1,291 refunds for a total of \$398,194)
- 2004-2005 (1,415 refunds for a total of \$340,827)
- 2005-2006 (847 refunds for a total of \$365,950)

“This is a very straightforward process. We have refunds that belong to taxpayers and we want to give the money back. Thus, we must make repeated good faith efforts to make these refunds. Anything less on our part is a breach of our responsibilities to the taxpayers of this County,” McAllister concluded.

County Treasurer-Tax Collector Dan McAllister is responsible for tax collection, banking, investment, disbursement and accountability of public funds.

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